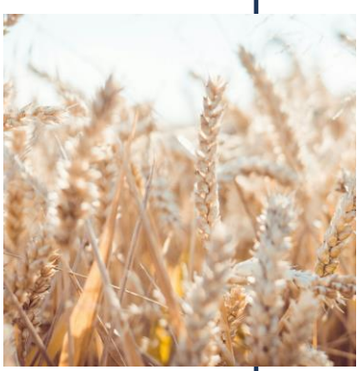


Outlook for Ukrainian agricultural market

2026

ucab

MINECONOMY

Dear colleagues, dear partners, dear friends of Ukraine,

It is my pleasure to present the Outlook for the Ukrainian Agricultural Market 2026 – a joint, data-driven publication prepared in close cooperation between the Ministry and UCAB. It brings together official data and sector expertise to provide partners with a clear picture of the structure, scale and real operating capacity of Ukrainian agriculture in wartime, and to support predictability and transparency in our cooperation.

Agriculture remains central to Ukraine's export economy and to our economic resilience. In 2025, agri-food accounted for *56.1%* of Ukraine's total goods exports (*$22.5 bln*) compared to *40.7%* (*$27.7 bln*) in 2021 – a shift that reflects both the shock of the full-scale war and the sector's stabilising role. Within this structure, the European Union is our key partner: in 2025 the EU share in Ukraine's agri-food exports stands at *47,5%* and has remained this high since the start of the full-scale Russian invasion, as logistics disruptions and security risks have reshaped access to many traditional third-country markets.

At the same time, the Outlook helps to put expectations on a realistic footing: Ukraine's agricultural output cannot be adjusted instantly in response to shifting market opportunities, as production and export capacity are shaped by real constraints – security conditions, logistics, weather, and available resources. By systematising production and trade trends across key product groups – from grains and oilseeds to animal products – the report offers a grounded basis for planning and a more structured, fact-based dialogue with partners. I hope it will serve as a practical reference for decision-makers and businesses in 2026. Thank you for your continued cooperation and support.

Sincerely,
Taras Vysotskyi
Deputy Minister of Economy, Environment and Agriculture of Ukraine

Report completed in February 2026 by UCAB based on the data provided by the Ministry of Economy, Environment and Agriculture of Ukraine.

Reuse is authorised, provided the source is acknowledged.

While every effort has been made to ensure that data and projections used in this material were obtained from reliable sources, uncertainties may remain.

The authors assume no responsibility or liability for any errors, omissions or the accuracy of projections in its content.

Contact: UCAB

Email: info@ucab.ua

CONTENT

HIGHLIGHTS **4**

Agriculture in Ukraine and role in world agriculture in 2025 5

Dynamics and structure of agricultural trade 6

Major importers of Ukrainian products in 2025 7

Evolution in routes of agricultural export logistics 8

PLANT PRODUCTS **9**

Wheat 9

Corn 10

Barley 11

Sunflower seed and sunflower oil 12

Soybean and soybean oil 14

Rapeseed and rapeseed oil 16

Sugar 18

ANIMAL PRODUCTS **19**

Beef 19

Pork 20

Poultry 21

Eggs 22

Milk and milk products 23

HIGHLIGHTS

- **Agriculture has become the stabiliser of Ukraine's export economy in wartime:** Over the past years, as many industrial and traditional export channels were disrupted, agri-food increasingly carried the country's export earnings and foreign exchange inflows. In 2025, agri-food accounted for 56.1% of total goods exports ($22.5 bn), underscoring the sector's role in economic resilience.

- **The EU has emerged as Ukraine's anchor market for agri-food trade:** Since the start of the full-scale Russian invasion, trade flows were reshaped by security risks and logistics disruptions, with the EU becoming the most stable and predictable destination. The EU share in Ukraine's agri-food exports is 47,5.

- **Ukrainian agriculture operates under lasting wartime constraints – and that shapes what is realistically possible:** The Outlook helps align expectations with reality: output cannot be scaled up "overnight". Production and export capacity are influenced by conditions on the ground – security, logistics, weather, and resource availability – which directly affect planting decisions, yields, processing and shipment regularity.

- **Losses and damages remain a defining background for sector performance and investment needs:** The current estimates of over $100 bn in direct damages and losses to the sector since the beginning of the full-scale war, highlighting why recovery, financing, infrastructure and risk mitigation remain central to future competitiveness.

- **Despite the shocks, production and trade demonstrate continuity across key product groups:**
  - In 2025/26 MY, Ukraine cultivated about 19.8 mln ha under key field crops, slightly below the previous marketing year (about 20.2 mln ha).
  - The structure of plantings reflects both market signals and wartime constraints: wheat expanded to 5.1 mln ha and corn to 4.5 mln ha, while sunflower remained broadly stable at 5.2 mln ha. A major adjustment came in soybeans, down to 2.1 mln ha after an exceptionally high previous season, while rapeseed stayed stable at 1.3 mln ha. Sugar beet declined to 199 thous. ha, reflecting limited ability to redirect exports and new constraints in the EU market.
  - The sector remains capable of delivering significant export volumes — while continuously adapting routes, product mixes, and processing decisions to changing conditions.

- **A fact-based baseline for 2026: planning, predictability, and structured dialogue:** By systematising trends in production, processing and trade across the agri-food basket, the Outlook serves as a practical reference for decision-makers and businesses. It supports a more structured conversation with partners in 2026 – focused on realistic capacity, market functioning, and predictable cooperation.

AGRICULTURE IN UKRAINE

ROLE IN UKRAINIAN ECONOMY

Agri-Food Share in Total Export in 2025

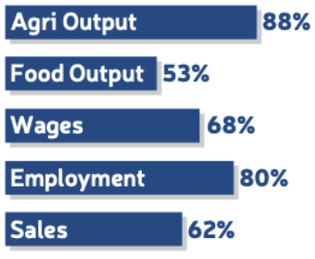
56.1% OR $22.5 BLN

compared to **40.7%** or **$27.7 BLN** in 2021

Agri-food share in Gross Domestic Product (GDP) in 2024

13.7% OR $26 BLN

SME Contribution to the Agri-Food Sector in 2024



9.8% OR $18.6 BLN

Source: SSSU, MAPF

ROLE IN WORLD AGRICULTURE IN 2025

EXPORT EARNINGS

	Export, mln $	Production	Export
sunflower oil	5,214	#2	#2
corn	3,901	#7	#4
wheat	2,988	#10	#7
soybeans	1,333	#9	#7
poultry	1,088	#19	#6
rapeseed	886	#15	#6
sunflower meal	807	#2	#1
soybean oil	588	#14	#6
soybean meal	521	#14	#6
rapeseed oil	398	#15	#6
barley	341	#7	#5
white sugar	221	#20	#12
butter	107	#13	#8
powdered milk, cream	96	#13	#9
beef	88	#21	#17
live bovine animals	43	#15	#7
sunflower seeds	43	#2	#9
wallnuts	78	#5	#5

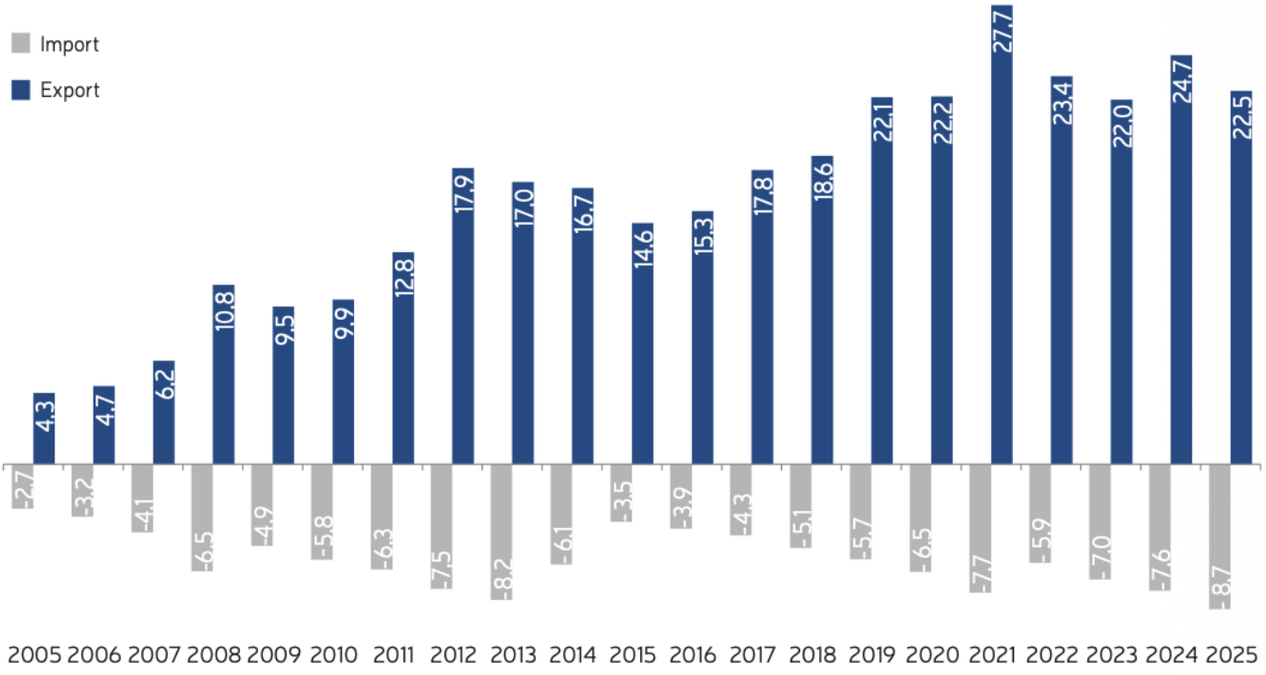
Source: USDA, rank by natural indicators

DYNAMICS AND STRUCTURE OF AGRICULTURAL TRADE, BLN $

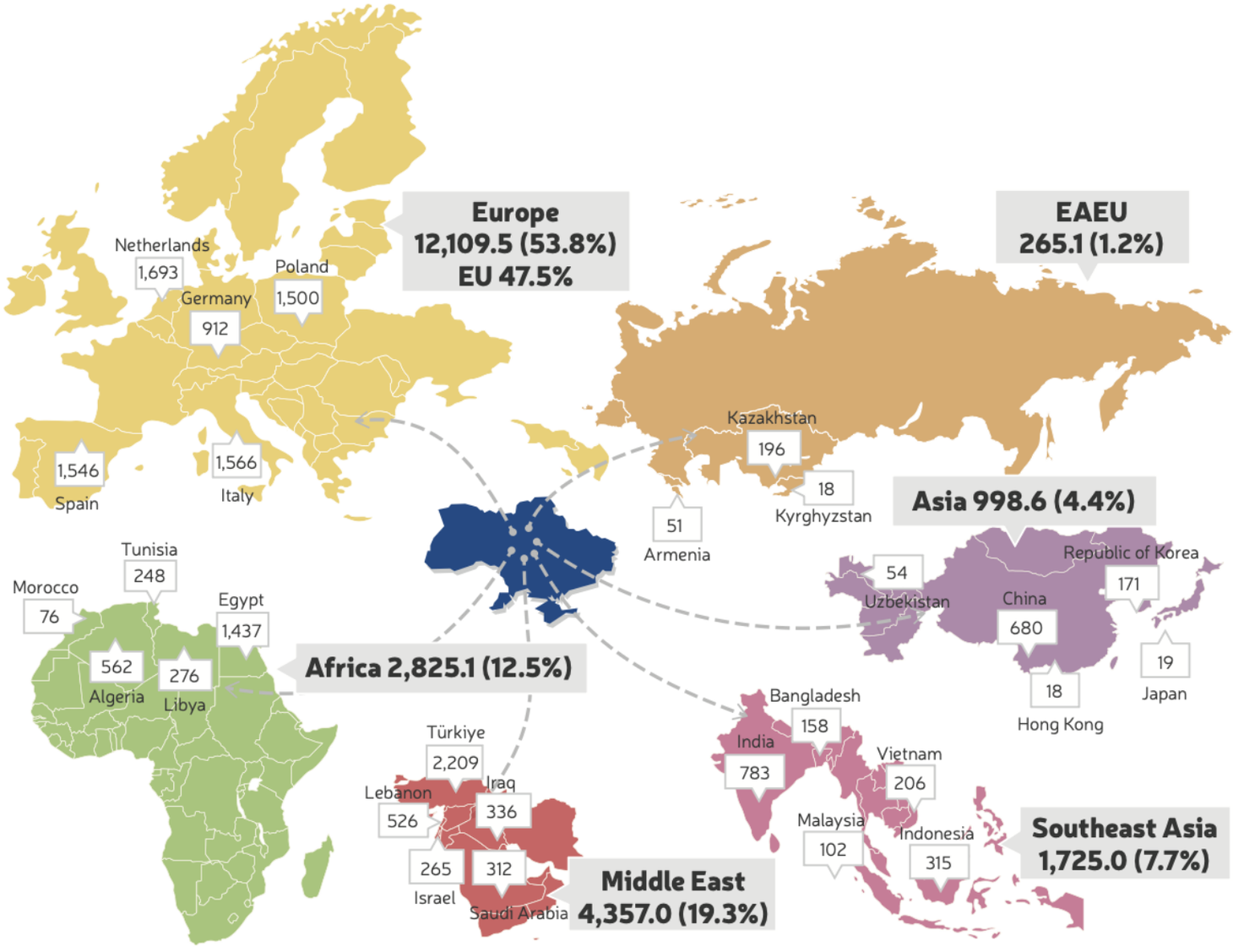
STRUCTURE OF TRADE IN 2025

- GRAIN
- VEGETABLE OILS
- OILSEEDS
- RESIDUES FROM THE FOOD INDUSTRIES
- LIVESTOCK PRODUCTS
- SUGAR, HONEY, SUGAR CONFECTIONERY
- FRUITS AND FRUIT PRODUCTS
- CONFECTIONERY
- MILK AND MILK PRODUCTS
- BEVERAGES
- PRODUCTS OF THE MILLING
- OTHER
- VEGETABLES
- NUTS
- FISH PRODUCTS

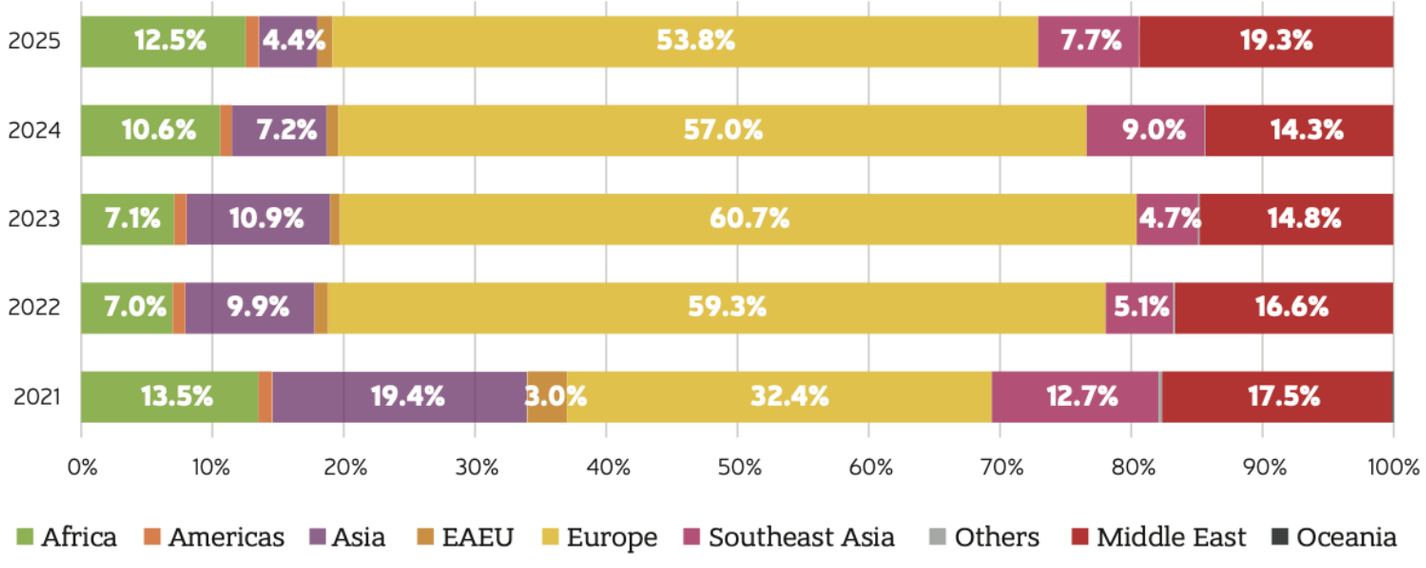
DYNAMICS OF TRADE, BLN $



MAJOR IMPORTERS OF UKRAINIAN PRODUCTS 2025, MLN $

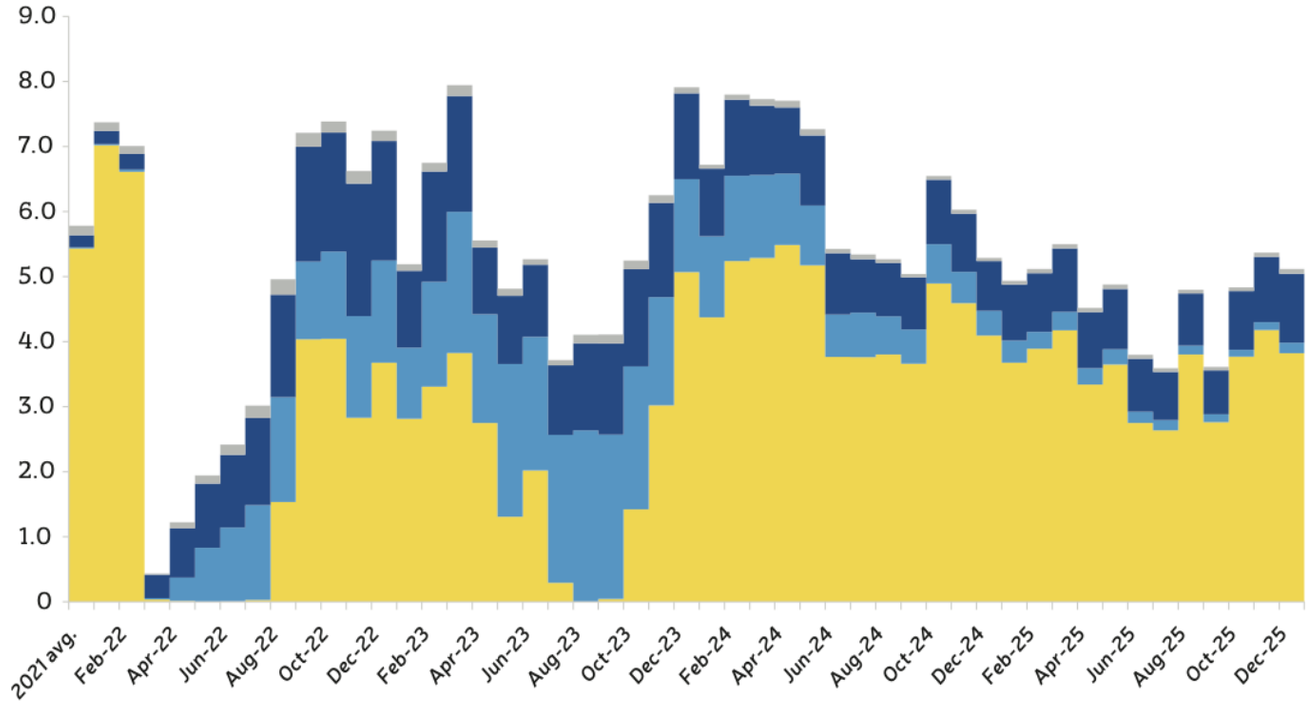


EXPORT DESTINATIONS OVER THE YEARS

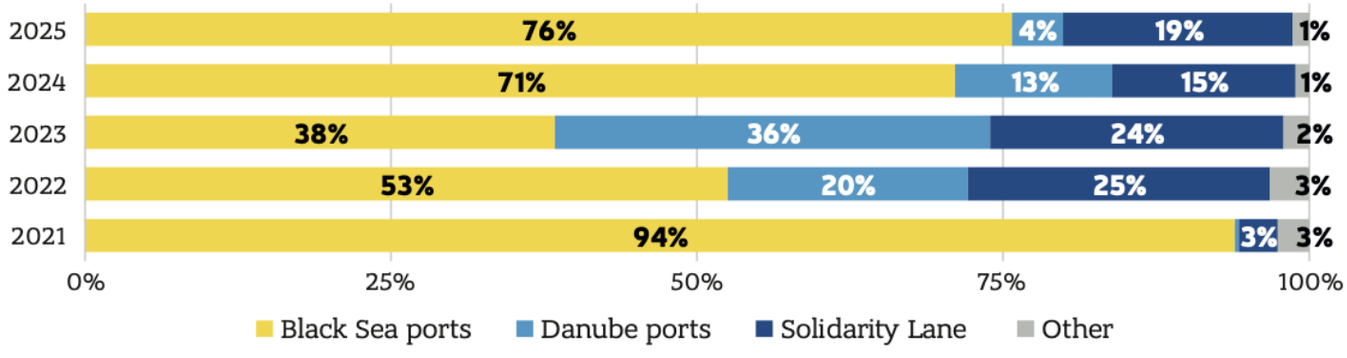


EVOLUTION AND ROUTES OF AGRICULTURAL EXPORT LOGISTICS

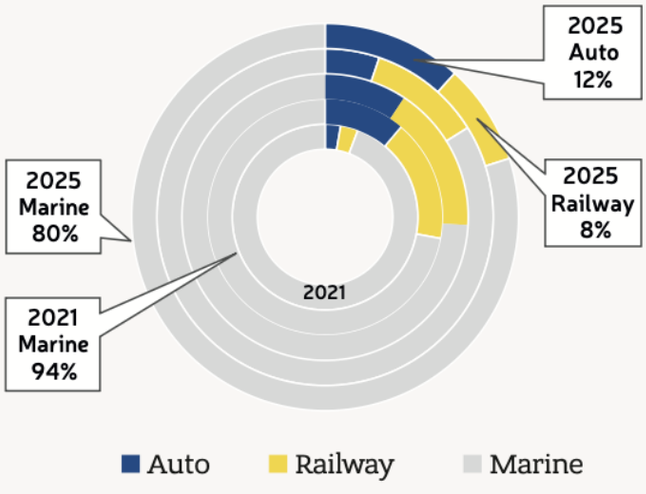
DYNAMICS AND PATHWAYS OF EXPORT LOGISTICS, MLN T



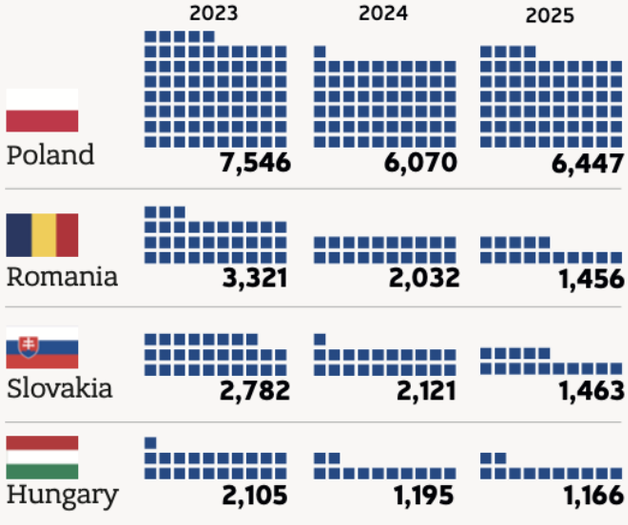
EXPORT LOGISTICS CHANNELS



EXPORT LOGISTICS BY TYPE OF TRANSPORT



EXPORT VIA SOLIDARITY LANE

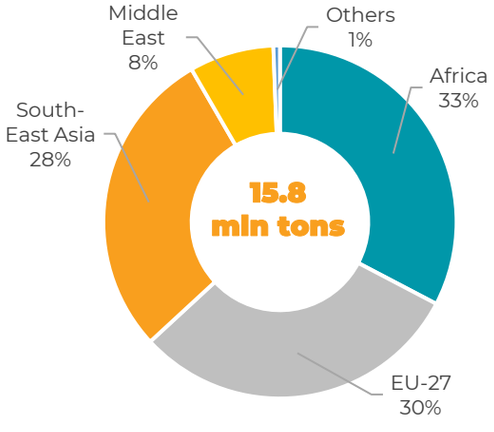


Wheat

Ukrainian area, production and yield of wheat

Ukrainian wheat trade, million tons

Export geography in 2024/25 MY



- **Wheat production**

In 2025/26 MY, the area under wheat in Ukraine was 5.1 mln ha (4.8% above the last marketing year and 11.1% below the 5-year average). The temporary occupation of a large part of Ukrainian territory by russian troops caused a significant decrease in the wheat areas in the longer term.

At the same time, the average yield in 2025/26 MY amounted to 4,5 tons per hectare (1.7% below the last marketing year and 5.1% above the 5-year average). Yields in the current marketing year were slightly lower due to weather conditions. However, they remain at a fairly high level.

The increase in sown areas offset the decline in yields. Therefore, wheat production in 2025/26 MY is estimated at 23.1 mln tons (2.9% above the previous marketing year but 6.2% below the 5-year average).

- **Domestic consumption of wheat in Ukraine**

In 2025/26 MY, domestic wheat consumption is expected to reach 6.2 mln tons, including 3.7 mln tons for household consumption and 1.5 mln tons for feed. In recent years, the domestic consumption of wheat for both food and feed has been decreasing due to the temporary occupation of part of Ukraine by russian troops and forced migration of the population due to military actions.

- **Ukrainian wheat international trade**

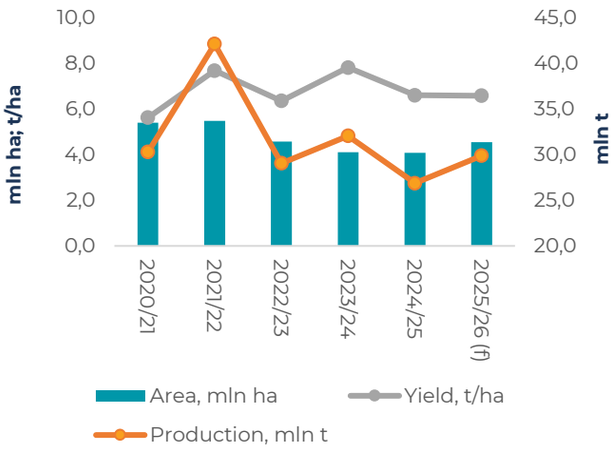
Ukraine has long been a major wheat exporter. Wheat imports have always been minimal. In 2024/25 MY, Ukraine exported 15.8 mln tons of wheat (15.1% below the last MY). The main reason for the decline in exports is the absence of stocks at the beginning of the season due to the organization of Ukraine's own export sea route. In 2025/26 MY, Ukraine is expected to export 17.6 mln tons (11.5% above the previous period).

Ukrainian wheat supply and use, thousand tons

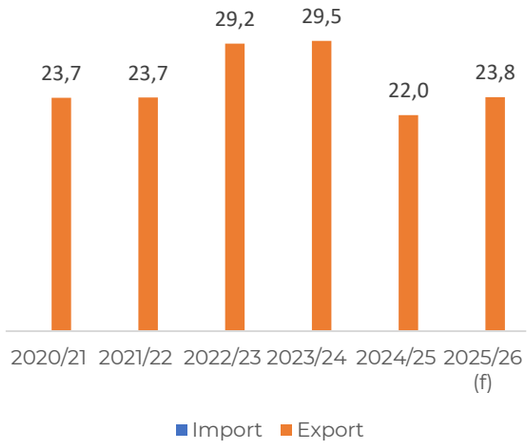
	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Beginning stocks	1 699	6 209	3 963	1 428	1 667
Production	32 151	21 396	22 236	22 441	23 099
Import	98	44	68	82	73
Animal feed	1 171	1 410	1 351	1 480	1 466
Consumption	4 241	3 815	3 851	3 815	3 701
Seed	1 514	940	808	986	825
Non-food processing	42	60	59	55	54
Losses	1 856	375	143	126	131
Export	18 913	17 086	18 627	15 822	17 635
Ending stocks	6 209	3 963	1 428	1 667	1 028

Corn

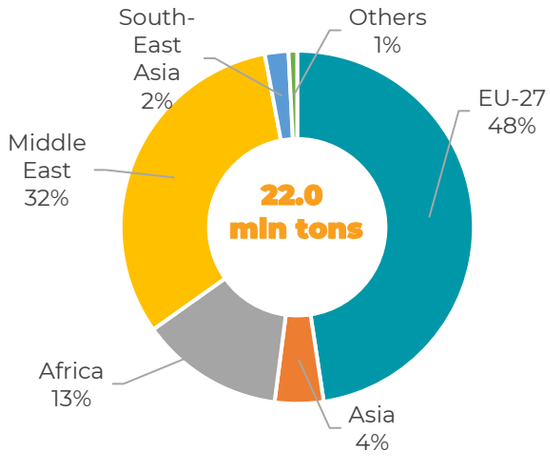
Ukrainian area, production and yield of corn



Ukrainian corn trade, million tons



Export geography in 2024/25 MY



- **Corn production**

In 2025/26 MY, the area under corn was 4.5 mln ha (11.6% above the last marketing year and 3.9% below the 5-year average). As with all crops, corn areas decreased significantly due to the temporary occupation of part of Ukraine by russian troops.

Unfortunately, in 2025/26 MY, as during the previous period, difficult weather conditions prevented high yields. In addition, heavy autumn rainfall led to a prolonged harvest, even in January 2026. According to preliminary estimates, the average corn yield in 2025/26 MY will be 6.6 t/ha (0.3% below the last marketing year and 3.4% below the 5-year average).

Due to an increase in sowing areas in 2025/26 MY, corn production is expected to reach 29.9 mln tons (11.2% above the last marketing year and 6.8% below the 5-year average).

- **Domestic consumption of corn in Ukraine**

In 2025/26 MY, the domestic consumption of corn is estimated at 6.2 mln tons, of which 5.2 mln tons will be used as feed.

- **Ukrainian corn international trade**

In 2024/25 MY, Ukraine exported 22.0 mln tons of corn (25.6% below the previous marketing year). The decline in exports was due to lower corn production and a significant reduction in transitional stocks.

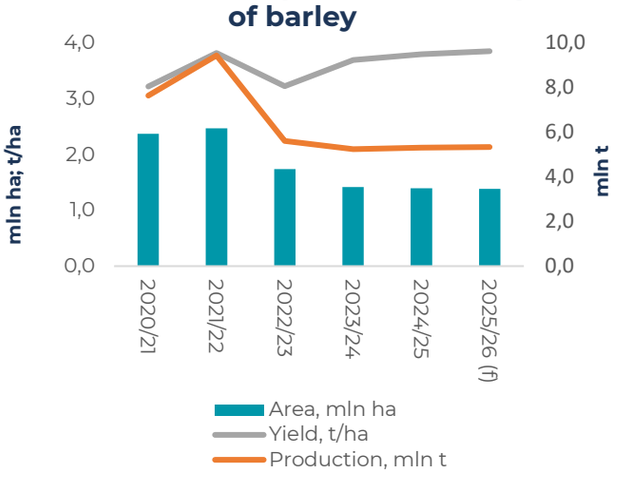
In 2025/26 MY, exports are expected to reach 23.8 mln tons of corn (8.3% above the previous period). The growth in exports will be driven by the recovery in production volumes.

Ukrainian corn supply and use, thousand tons

	2021/22	2022/23	2023/24	2024/25	2024/25 (f)
Beginning stocks	1 610	12 731	6 452	3 696	2 328
Production	42 110	29 044	32 056	26 864	29 878
Import	18	30	24	33	30
Animal feed	5 241	4 980	4 420	5 263	5 211
Consumption	195	190	153	200	194
Seed	312	185	169	184	182
Non-food processing	542	260	300	424	418
Losses	980	510	271	231	228
Export	23 737	29 228	29 523	21 963	23 783
Ending stocks	12 731	6 452	3 696	2 328	2 221

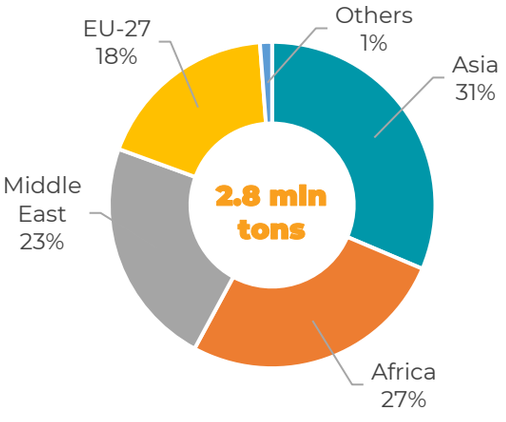
Barley

Ukrainian area, production and yield of barley



Ukrainian barley trade, million tons

Export geography in 2024/25 MY



• Barley production

In 2025/26 MY, barley was cultivated on 1.4 mln ha (0.9% below the last marketing year and 26.4% below the 5-year average). Among all grains, barley areas decreased the most. In addition to the temporary occupation of part of the territory, the lower export potential also played a role.

In 2025/26 MY, barley yield was 3.9 t/ha (0.4% above the last marketing year and 8.4% above the 5-year average). This is the only grain to show higher yields in 2024/25 MY than in previous periods.

In 2025/26 MY, Ukraine harvested 5.3 mln tons of barley (0.4% above the last marketing year and 19.7% below the 5-year average).

• Domestic consumption of barley in Ukraine

Domestic consumption of barley in 2025/26 MY is estimated at 2.8 mln tons, of which 1.9 mln tons are for feed and 0.2 mln tons – for food. Domestic barley consumption in Ukraine has been declining for a long time.

• Ukrainian barley international trade

In 2024/25 MY, barley export volume was 2.3 mln tons (8.4% below the previous marketing year).

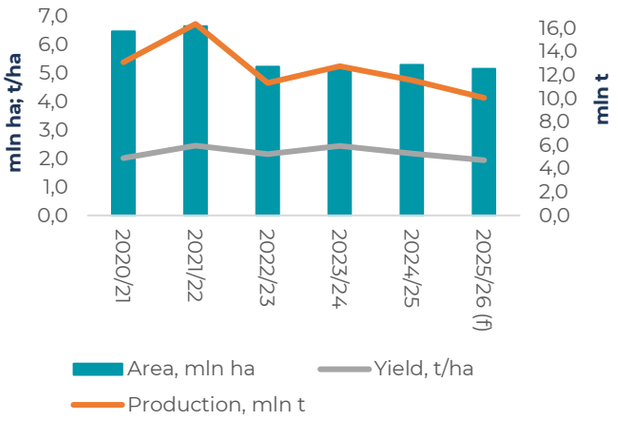
Exports are expected to increase by 22.0% to 2.8 mln tons in 2025/26 MY. This growth will be possible due to increased production, reduced domestic consumption and high transitional stocks.

Ukrainian barley supply and use, thousand tons

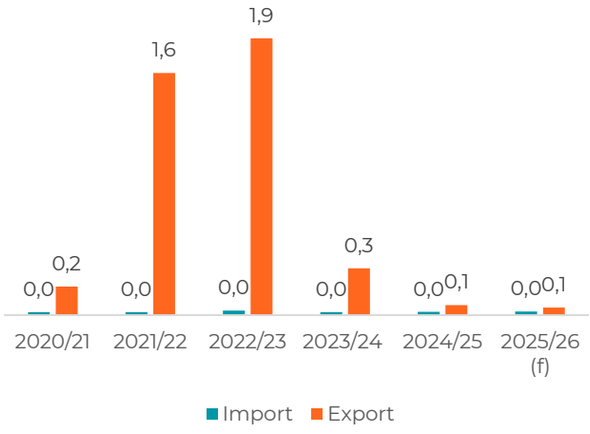
	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Beginning stocks	407	432	538	463	656
Production	9 437	5 608	5 247	5 314	5 336
Import	33	20	7	6	6
Animal feed	2 381	1 710	1 750	1 912	1 893
Consumption	197	185	184	188	182
Seed	447	414	386	329	308
Non-food processing	301	260	312	325	320
Losses	334	200	165	54	52
Export	5 786	2 753	2 532	2 319	2 783
Ending stocks	432	538	463	656	460

Sunflower seed

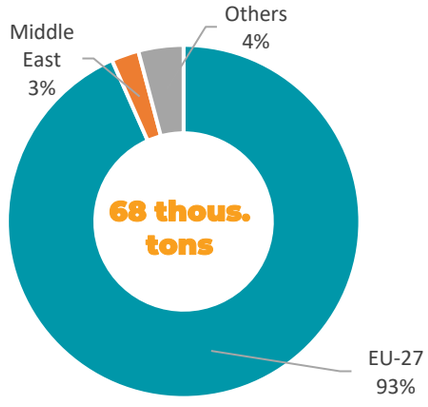
Ukrainian area, production and yield of sunflower seed



Ukrainian sunflower seed trade, million tons



Export geography in 2024/25 MY



- **Sunflower seed production**

In 2025/26 MY, the total area under sunflower seeds was 5.2 mln ha (2.6% below the last marketing year and 10.7% below the 5-year average). The main factor behind the decrease in sunflower areas is the temporary occupation of Ukrainian territory. However, in the context of the war and limited export logistics, growing oilseeds was more profitable, and the area under sunflower seeds in the controlled territory of Ukraine increased.

Difficult weather conditions (primarily insufficient rainfall) over the last two seasons have led to a decline in sunflower yields. In 2025/26 MY the sunflower seed yield was 2.0 t/ha (10,6% below the last marketing year and 13.5% below the 5-year average).

Due to decreased sown areas and yields, the harvest of sunflower seeds in 2025/26 MY is expected at 10.1 mln tons (10.6% below the last marketing year and 13.5% below the 5-year average).

- **Domestic consumption of sunflower seed in Ukraine**

Almost all sunflower seed production is processed in Ukraine. A significant part of it (except for domestic needs) is exported as sunflower oil and sunflower meal. In 2025/26 MY, sunflower seed processing volumes are estimated at 10.0 mln tons.

- **Ukrainian sunflower seed international trade**

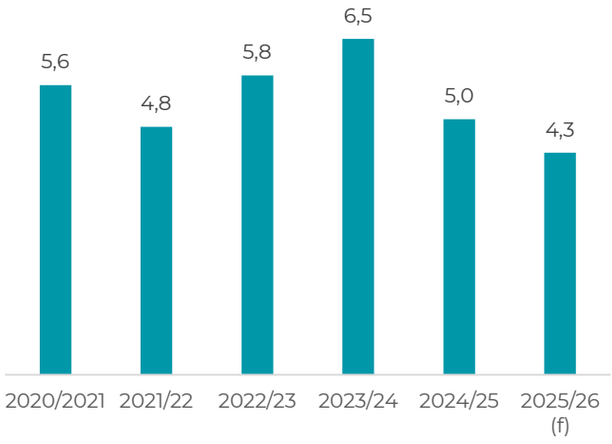
The Ukrainian sunflower seed market is characterized by minimal exports. The only exception was for 2021/22 and 2022/23 MY, due to the lack of sea export logistics and electricity blackouts, the domestic processing of sunflower oil was also partially suspended. At that time, Ukrainian farmers were forced to export sunflower seeds, whose exports reached more than 1.5 mln tons per year. In 2024/25 MY 68 thous. tons were exported, 4.6 times less than in the previous period. In 2025/26 MY, the exports are expected to be 50 tons (26.5 tons below the last MY).

Ukrainian sunflower seed supply and use, thousand tons

	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Beginning stocks	101	2 942	1 394	230	100
Production	16 392	13 301	14 017	10 956	10 064
Import	21	31	20	22	24
Export	1 623	1 855	313	68	50
Processing	11 262	13 025	14 888	11 643	10 028
Ending stocks	2 942	1 394	230	100	110

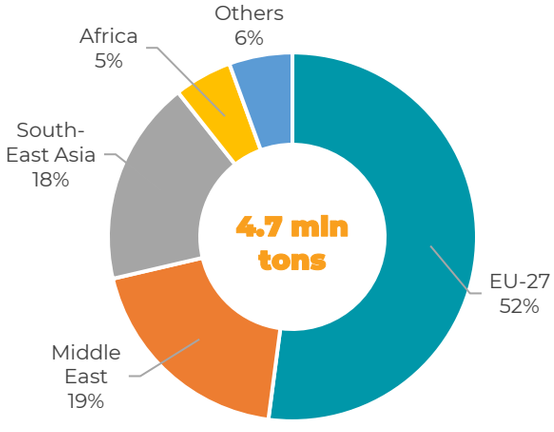
Sunflower oil

Production of sunflower oil, million tons



Ukrainian sunflower oil trade, million tons

Export geography in 2024/25 MY



- **Sunflower oil production**

In 2024/25 MY, sunflower oil production in Ukraine amounted to 5.0 mln tons (23.9% below the last marketing year). This significant decline was due to high production levels in 2023/24 MY, driven by large sunflower seed stocks built on limited exports and the inability to export sunflower oil freely at the beginning of the war.

In 2025/26 MY, sunflower oil production is expected to decline due to this year's lower sunflower seed harvest. According to preliminary estimates, this year's production is expected to reach 4.3 mln tons (13.1% below the last marketing year and 22.2% below the 5-year average).

- **Domestic consumption of sunflower oil in Ukraine**

In 2025/26 MY, Ukraine's domestic consumption of sunflower oil is estimated at 240 thous. tons (2.0% below the previous marketing year). In recent years, the consumption of sunflower oil in Ukraine has decreased. This is related to the partial temporary occupation of the territory of Ukraine, together with the forced migration of the population due to active hostilities in Ukraine.

- **Ukrainian sunflower oil international trade**

Ukraine is a net exporter of sunflower oil. In 2025, this position was preserved, and producers earned the largest export revenue among all agricultural products.

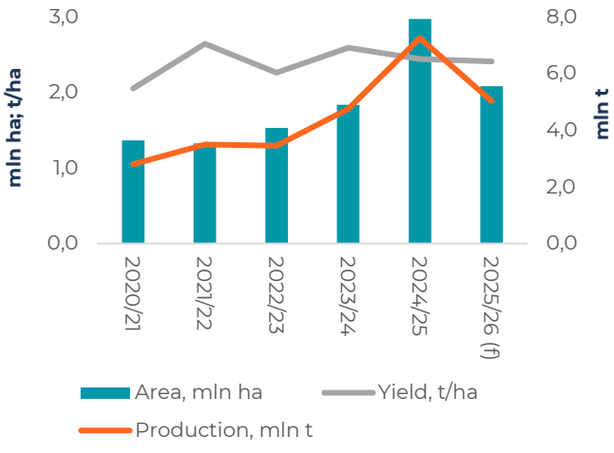
The export volume is expected to reach 4.1 mln tons in 2025/26 MY, 14.0% below the previous marketing year due to a decrease in sunflower seed production.

Ukrainian sunflower oil supply and use, thousand tons

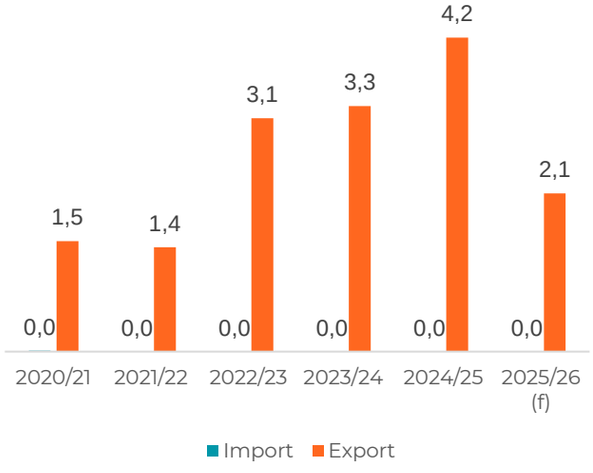
	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Production	4 825	5 822	6 532	4 971	4 322
Stock change	67	-60	26	-10	7
Import	1	1	1	1	1
Export	4 471	5 624	6 248	4 731	4 068
Loses	8	10	9	7	7
Consumption	280	249	250	245	240

Soybean

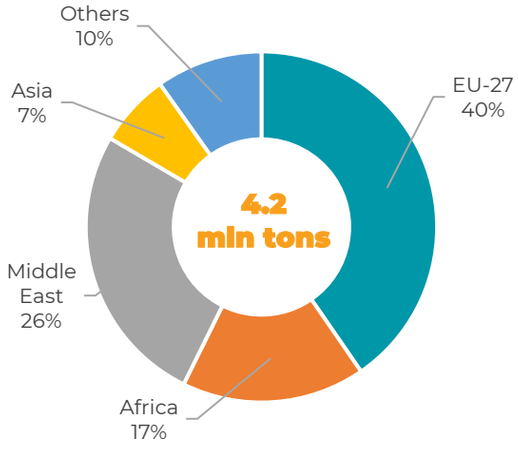
Ukrainian area, production and yield of soybean



Ukrainian soybean trade, mln t



Export geography in 2024/25 MY



- **Soybean production**

In 2025/26 MY, Ukrainian farmers sowed about 2.1 mln ha of soybeans (30.0% below the last marketing year and 15.3% above the 5-year average). The previous season had the largest soybean sowing area in the history of independent Ukraine. Such rapid growth is explained by the fact that in 2022/23 and 2023/2 MY, soybeans were nearly the only profitable crop due to favourable global market conditions and high demand in the EU – the closest logistical market during Russia's war against Ukraine - which, logically, led to an increase in sown areas. It is expected that in 2025/26 MY the soybean sowing areas will stabilise.

In 2025/26 MY, Ukrainian farmers achieved an average yield of 2.4 t/ha (1.2% below the last marketing years and 0.6% above the 5-year average).

The soybean harvest in 2025/26 MY is estimated at 5.0 mln tons (-30.8% above the last marketing year and 15.4% above the 5-year average). The main factor contributing to the decline in harvest was the reduction in sowing areas.

- **Domestic consumption of soybeans in Ukraine**

The volume of domestic soybean use in Ukraine is increasing every year. This is mainly due to the growth of processing, namely the production of soybean oil and soybean meal. According to the preliminary estimates, in 2025/26 MY, this figure is expected to reach 2.9 mln tons (2.6% below the last marketing year and 51.4% above the 5-year average).

- **Ukrainian soybean international trade**

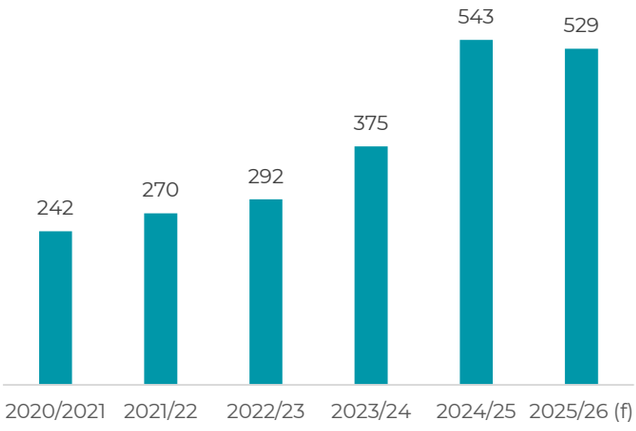
The 2024/25 MY had record soybean exports. However, export shipments are expected to decline in 2025/26 due to reduced production and the introduction of a the export duty for non-producers. In 2025/26 MY, soybean exports are expected to reach 2.1 mln tons (2.0 times below the last marketing year).

Ukrainian soybean supply and use, thousand tons

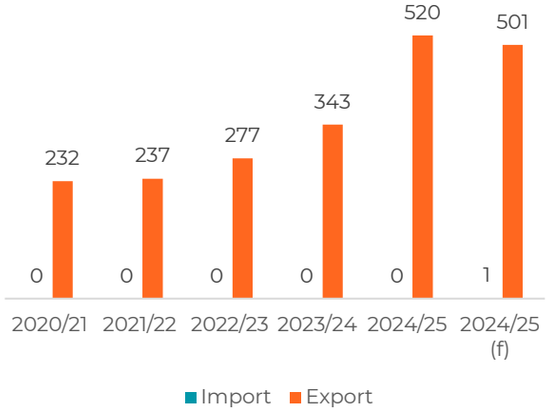
	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Beginning stocks	199	581	178	190	250
Production	3 493	4 313	5 359	7 244	5 012
Import	1	2	1	1	1
Export	1 384	3 097	3 257	4 163	2 100
Processing and others	1 603	1 622	2 091	3 023	2 943
Ending stocks	581	178	190	250	220

Soybean oil

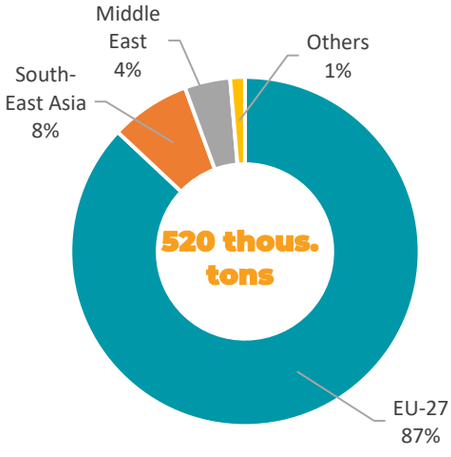
Production of soybean oil, thousand tons



Ukrainian soybean oil trade, thousand tons



Export geography in 2024/25 MY



- **Soybean oil production**

In 2024/25 MY, Ukraine produced 543 thous. tons of soybean oil (44.6% above the previous marketing year). The upward trend in soybean oil production has persisted for several years. While soybean production is expected to decline significantly in the 2025/26 MY, soybean oil production is expected to decline only slightly. In 2025/26 MY, according to preliminary estimates, production is expected to increase to 527 thous. tons (2.6% below 2024/25 MY). The preservation of soybean oil production volumes is due to the introduction of the export duty for non-producers and a reduction in soybean export shipments.

- **Domestic consumption of soybean oil in Ukraine**

Ukrainian consumers are more accustomed to using sunflower oil. Therefore, domestic soybean oil consumption is minimal, at 25-30 thous. tons. Therefore, in 2025/26 MY, about 95% of soybean oil production will be exported.

- **Ukrainian soybean oil international trade**

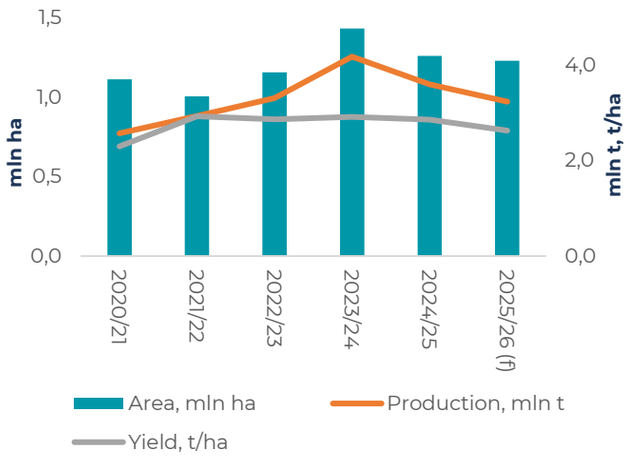
Although soybean oil imports into Ukraine are minimal, exports have been growing alongside production growth. In 2024/25 MY, Ukraine exported 520 thous. tons of the product (51.4% above the previous marketing year). Exports are forecasted to decline by 3.7% to 501 thous. tons in 2025/26 MY.

Ukrainian soybean oil supply and use, thousand tons

	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Production	270	292	375	543	529
Stock change	12	-2	5	-6	-5
Import	0	0	0	0	1
Export	237	277	343	520	501
Loses	5	2	3	4	4
Consumption	16	15	24	25	30

Rapeseed

Ukrainian area, production and yield of rapeseed



- **Rapeseed production**

In 2025/26 MY, the rapeseed area was 1.3 mln ha (2.4% below the previous marketing year and 3.0% above the 5-year average). The sown area under rapeseed remains relatively stable, despite Russia's occupation of part of Ukraine's territory.

In 2025/26 MY, due to difficult weather conditions, yields were lower than expected: 2.6 t/ha (8.0% below the previous marketing year and 5.3% below the 5-year average).

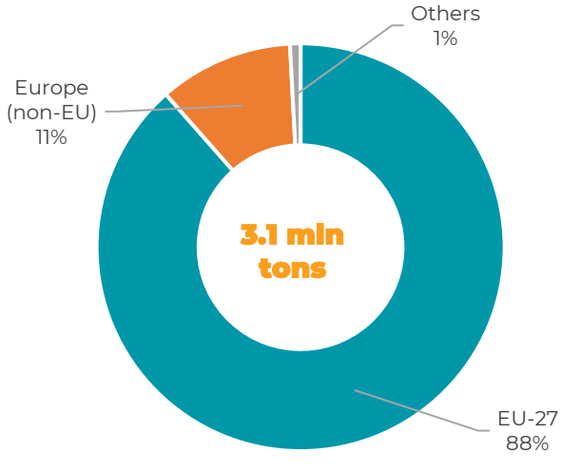
Due to decreased sown areas and low yields, the rapeseed harvest in 2025/26 MY was 3.2 mln tons (10.1% below the previous marketing year and 5.3% below the 5-year average).

Ukrainian rapeseed trade, million tons

- **Domestic consumption of rapeseed in Ukraine**

Domestic rapeseed consumption and processing in 2025/26 MY are estimated at 1.5 mln tons (2.6 times above the previous marketing year). Such a significant increase in processing, even taking into account the decline in harvest, is due to the introduction of the export duty on rapeseed for non-producers.

Export geography in 2024/25 MY



- **Ukrainian rapeseed international trade**

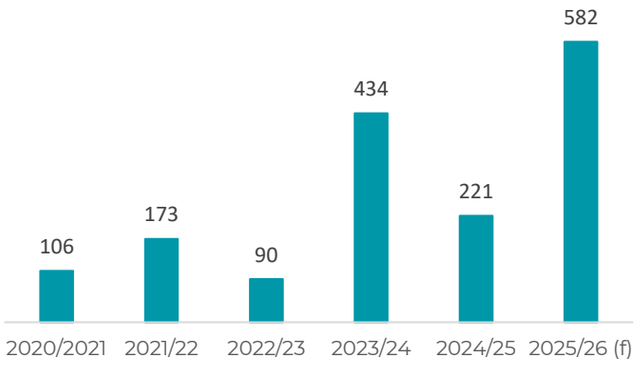
In 2024/25 MY, Ukraine exported 3.1 mln tons of rapeseed (14.9% below the 2023/24 MY). In 2025/26 MY, rapeseed exports are expected to reach 1.8 mln tons (1.8 times below the 2024/25 MY). A significant reduction in rapeseed exports is expected due to the introduction of an export duty for non-producers and increased internal processing.

Ukrainian rapeseed supply and use, thousand tons

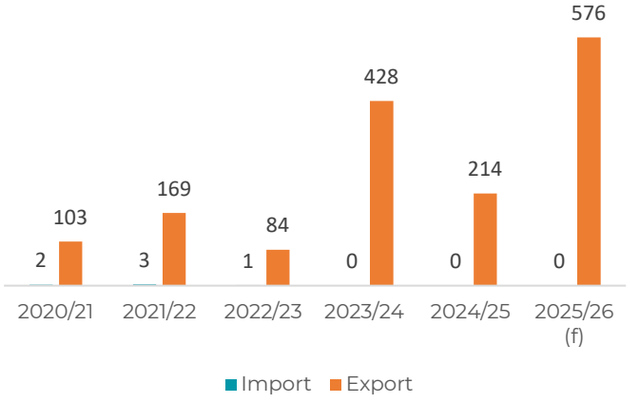
	2022/23	2022/23	2023/24	2024/25	2025/26 (f)
Beginning stocks	108	70	90	75	51
Production	3 119	3 625	4 788	3 689	3 310
Import	12	40	7	5	5
Export	2 710	3 399	3 695	3 144	1 786
Processing and others	457	245	1 115	575	1 520
Ending stocks	70	90	75	51	60

Rapeseed oil

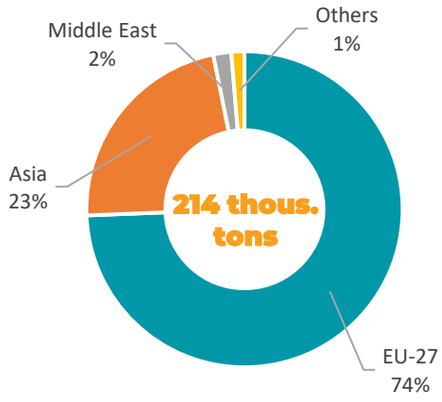
Production of rapeseed oil, thousand tons



Ukrainian rapeseed oil trade, thousand tons



Export geography in 2024/25 MY



- **Rapeseed oil production**

In 2024/25 MY, Ukraine produced 221 thous. tons of rapeseed oil (2.0 times below the previous marketing year). High demand for rapeseed has led to a decline in processing in the country.

At the same time, rapeseed oil production in 2025/26 MY is expected to increase 2.6 times to 582 thous. tons due to the introduction of the export duty on rapeseed for non-producers and a corresponding increase in processing in Ukraine.

- **Domestic consumption of rapeseed oil in Ukraine**

As with soybean oil, rapeseed oil consumption is extremely low because Ukrainians prefer sunflower oil. The annual consumption of rapeseed oil is 4-6 thous. tons, and the rest produced is exported.

- **Ukrainian rapeseed oil international trade**

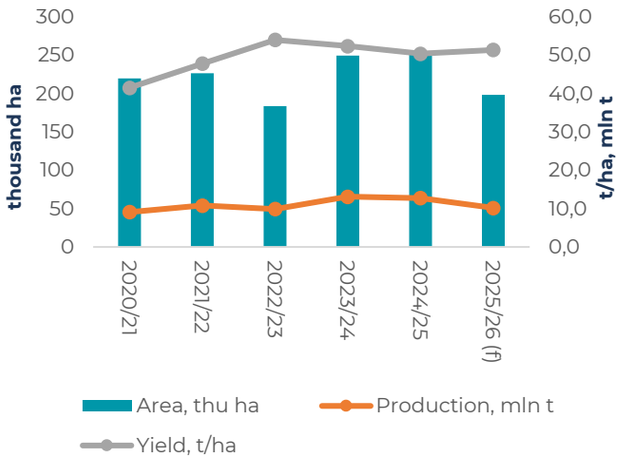
Due to low rapeseed oil consumption, almost all of the production is exported. In 2024/25 MY, the export volume was 214 thous. tons (2.0 times lower than the previous marketing year). In 2025/26 MY, exports are expected to increase by 2.7 times to 576 thous. tons.

Ukrainian rapeseed oil supply and use, thousand tons

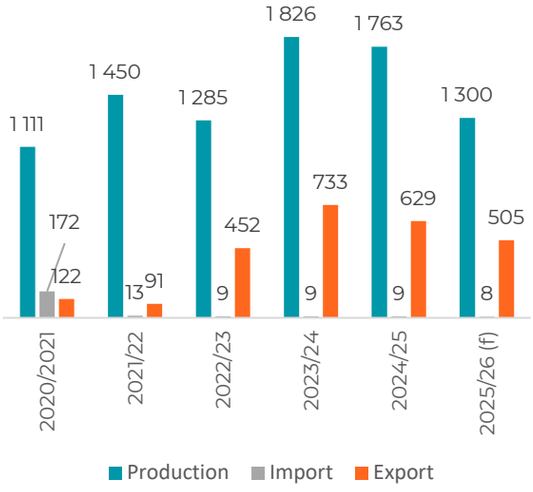
	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Production	173	90	435	221	582
Stock change	-1	1	1	2	-1
Import	3	1	0	0	0
Export	169	84	428	214	576
Loses	2	4	1	1	1
Consumption	5	3	5	4	6

Sugar

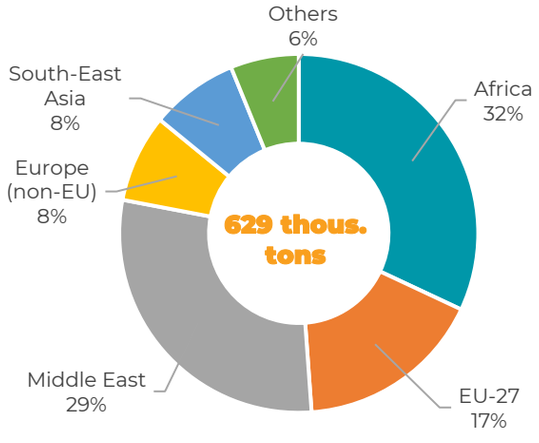
Ukrainian area, production and yield of sugar beet



Ukrainian sugar production and foreign trade, thousand tons



Export geography in 2024/25 MY



- **Sugar beet production**

In 2025/26 MY, Ukraine sowed 199 thous. ha of arable land with sugar beet (21.6% below the previous marketing year and 12.4% below the 5-year average). The reduction in sugar beet sowing areas is caused by the introduction of quotas on sugar supplies to EU countries, as well as still limited logistics to third markets. The inability to quickly redirect exports to other regions has led to a reduction in raw material production volumes.

At the same time, the sugar beet yield was 49.3 t/ha (2.0% above the previous marketing year and 4.4% above the 5-year average).

Due to a significant reduction in sowing areas, the sugar beet harvest is expected to reach 10.2 mln tons, which is 20.3% lower than the previous year and 8.7% below the average for the last 5 years.

- **Sugar production and consumption in Ukraine**

Considering the harvest, Ukraine will be able to produce about 1.3 mln tons of sugar in the current marketing year (26.3% below the previous MY and 12.6% below the 5-year average).

Before the full-scale war, domestic sugar consumption was at 1.1 mln tons. In 20225/26 MY, it is forecasted to decline to 0.9 mln tons, mainly due to a decrease in Ukraine's population.

- **Ukrainian sugar international trade**

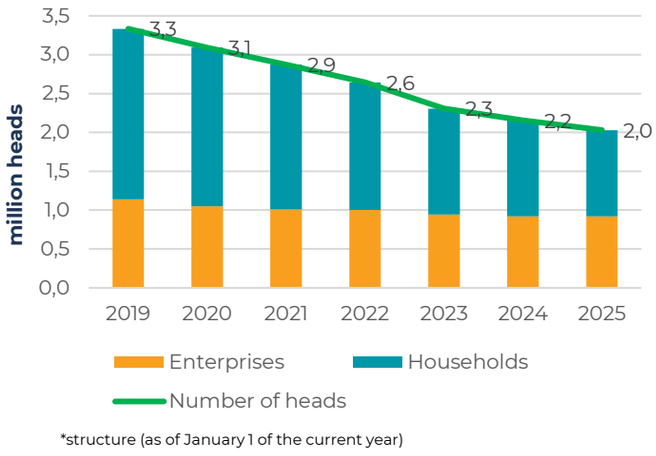
Ukraine has almost always been a sugar exporter and rarely imports it. In 2024/25 MY, the country exported 629 thous tons of sugar (14.2% below the previous MY). This decline was caused by the introduction of quotas on supplies to EU countries and by the inability to shift those volumes to other markets. In 2025/26 MY, exports are expected to reach 505 thous. tons (19.7% below the previous marketing year), with an increased share of traditional markets.

Ukrainian sugar supply and use, thousand tons

	2021/22	2022/23	2023/24	2024/25	2025/26 (f)
Production	1 450	1 285	1 826	1 763	1 300
Beginning stocks	332	470	313	435	620
Import	13	9	9	9	8
Export	91	452	733	629	505
Loses and wastes	80	50	55	58	55
Ending stocks	470	313	435	620	468
Consumption	1 154	949	926	900	900

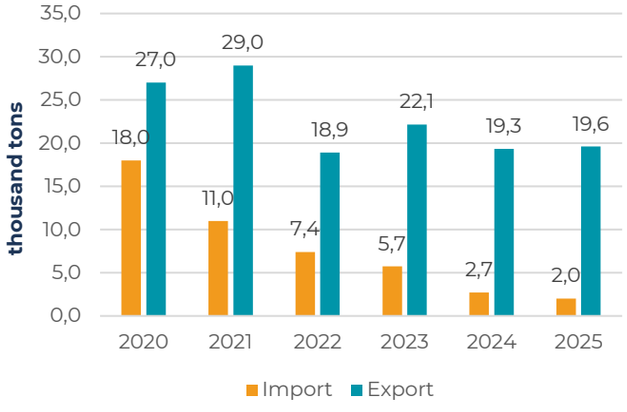
Beef

Number of animals

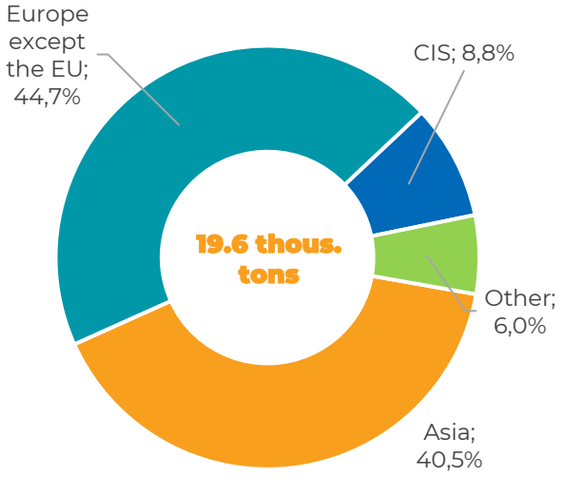


*structure (as of January 1 of the current year)

Export of beef



Export geography in 2025



- **Cattle stock and production**

In 2025, the number of cattle is 2.0 mln heads (-10% compared to 2024 and -24% below the 5-year average). The share of cattle in enterprises is 45% (0.9 mln heads), and 55% (1.1 mln heads) in households. The largest reductions occur in private households and in eastern regions due to hostilities and risks for farms. Additionally, keeping cows in rural areas is becoming economically difficult without state support and programs. In the central and western regions, the cattle population is relatively stable, with occasional slight increases at enterprises. Almost half of the total livestock are cows, reflecting the growing demand for dairy farming and dairy products.

- **Ukrainian export volumes of beef**

In 2025, Ukraine continues to actively export beef and live cattle, reflecting high international demand. Exports of frozen beef are also increasing significantly, while chilled beef exports remain limited and uneven. The beef exports reach 19,6 thous. tons (which is 1,5% less compared to 2024 and 15% below the 5-year average). Global market demand encourages Ukrainian farmers and enterprises to increase shipments abroad. Although beef exports have declined in recent years, this has also been influenced by the overall reduction in cattle numbers. At the same time, the domestic market is less active, and producers aim to optimize sales by focusing on more profitable external markets. Worldwide demand for meat, especially beef, continues to grow, prompting Ukrainian farmers to export live animals.

Beef imports are small and have been declining each year. It is projected that imports will total 2 thous. tons (35% less compared to 2024 and 4.5 times lower than the 5-year average) in 2025.

- **Ukrainian export geography of beef**

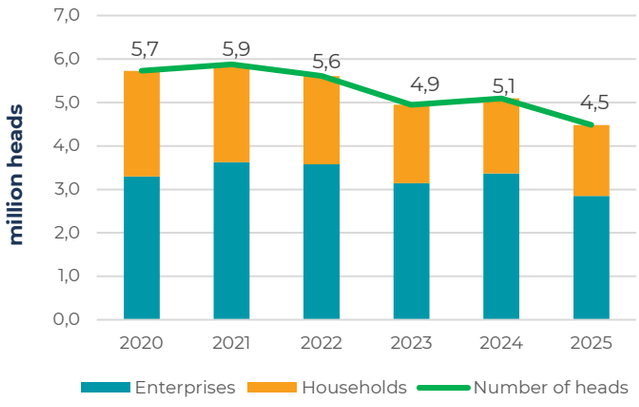
In 2025, the main export markets for Ukrainian beef are Asia (40.5%) and other European countries outside the EU (44.7%), reflecting strong and stable demand in these regions. Exports to CIS countries account for 8.8%, while the rest of the world receives only 6%. This export geography shows that Ukrainian beef is focused on key markets with high demand potential and strategic importance for exporters.

Ukrainian beef supply and use, thousand tons

	2020	2021	2022	2023	2024	2025
Production	345	311	268	257	224	222
Stock change	-2	1	-1	0	-1	1
Import	18	11	7.4	5.7	2,7	2
Export	27	29	18.9	22.1	19	19,6
Other uses	1	1	1	1	1	1
Fund of consumption	337	291	257	239	228	209

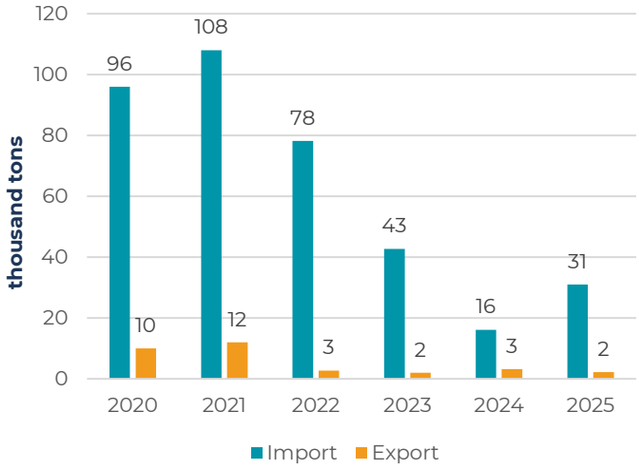
Pork

Number of animals

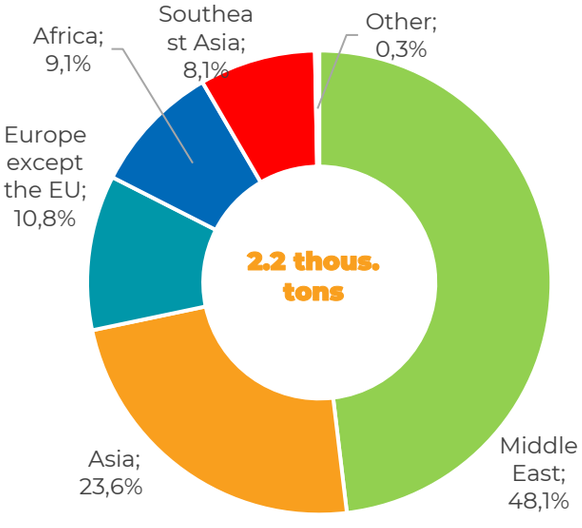


*structure (as of January 1 of the current year)

Export of pork



Export geography in 2025



- **Pig stock and production**

In 2025, Ukraine's pig herd is estimated at 4.5 mln heads, down 12% from 2024 and 18% below the 5-year average. Enterprises account for 64% of the total (2.9 mln heads), while households hold 36% (1.6 mln heads). The industrial production has experienced the largest decline, while private households have shown a slight decrease. Pork production in 2025 is 606 thous. tons, which is 10% less than in 2024, but 11% less than the 5-year average. The reduction at the beginning of the year was largely driven by the escalation of hostilities in eastern Ukraine, which forced many enterprises to close and affected overall livestock numbers. Overall, the sector is operating under challenging conditions and requires stabilization to recover.

- **Ukrainian export volumes of pork**

Until 2022, Ukraine's pork exports were relatively stable and low. Pork exports in 2025 are 2.2 thous. tons, which is -26% less than in 2024. Meanwhile, pork imports are showing significant growth, especially in the second half of the year. Imports in 2025 reached 30.8 thous. tons, which is 2 times more than in 2024, although still 55% below the 5-year average. The main reasons for the increase in imports are the decline in the domestic pig population and a shortage of live animals, which drove up prices on the local market. At the same time, pork prices abroad decreased during the summer, making imports more attractive and encouraging increased shipments to Ukraine. Overall, the trend indicates a growing reliance on imported pork to meet domestic demand in 2025.

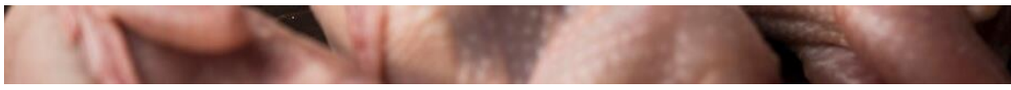
- **Ukrainian export geography of pork**

In 2025, most Ukrainian pork exports are directed to the Middle East (48.1%) and Asia (23.6%), reflecting strong demand in these regions. Exports to European countries outside the EU account for 10.8%, to Africa 9.1%, and to Southeast Asia 8.1%, while the rest of the world receives only 0.3%. This export geography shows that Ukrainian pork is focused on markets with high growth potential, particularly in regions with stable demand and well-developed trade infrastructure.

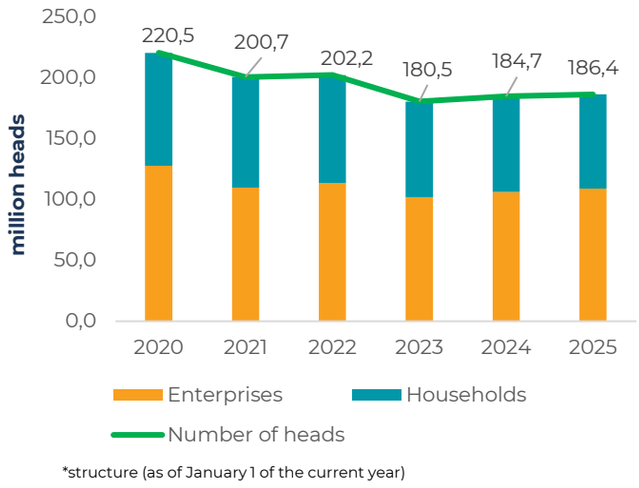
Ukrainian pork supply and use, thousand tons

	2020	2021	2022	2023	2024	2025
Production	697	724	659	638	672	606
Stock change	-4	2	2	-1	2	-1
Import	96	108	78	43	16	31
Export	10	12	3	2	3	2,2
Other uses	1	2	3	3	10	6
Fund of consumption	786	816	729	677	673	648

Poultry

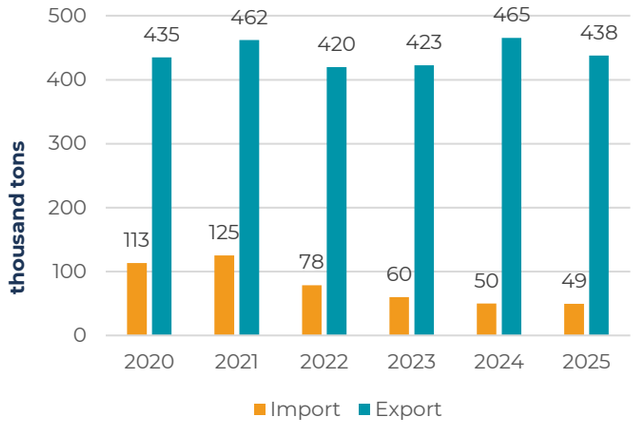


Number of animals

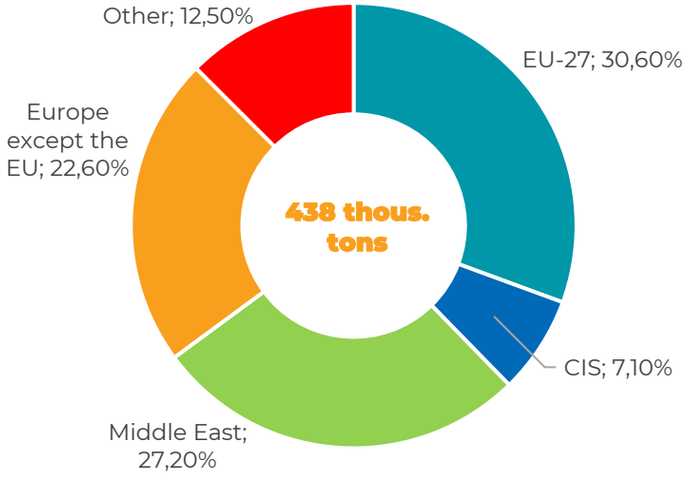


*structure (as of January 1 of the current year)

Ukrainian export of poultry



Export geography in 2025



- **Poultry stock and production**

In 2025, the poultry population is 186.4 mln heads, 0.1% higher than in 2024 but still 6% below the 5-year average. The share of poultry in industrial enterprises is 58%, while households and small farms account for 42%. This indicates a slow recovery of the sector after several years of instability. Despite the slight annual increase, the industry continues to face pressure from high feed costs, logistical disruptions, and energy supply risks.

Poultry meat production in 2025 is projected at 1,390 thous. tons, 1,5% lower than last year, but over 2.7% above the 5-year average. This increase is driven by the activity of industrial enterprises and modernization of production processes, despite high costs and limited access to electricity.

At the same time, the role of medium-sized and regional producers is strengthening. They actively invest in modernization, biosecurity improvements, and more efficient feeding systems. These producers play a key role in supporting the domestic market and maintaining the poultry sector's production potential amid uncertainty.

- **Ukrainian export volumes of poultry meat**

In 2025, poultry meat exports reached 438 thous. tons, which is 6% less than in 2024, but 1% higher than the average for 5 years. These volumes are not record-breaking, but analysis of recent years shows that the market has stabilized. The main export destinations remain European and Middle Eastern countries, where Ukrainian poultry has steady demand. In 2025, imports are projected at 49 thous. tons, 2% lower than in 2024 and 73% below the 5-year average, reflecting growing self-sufficiency and increased production capacity among domestic producers. At the same time, Ukrainian companies are expanding logistics capabilities to ensure a stable supply to foreign markets, while producers are implementing European regulations and directives to improve product quality and meet international standards.

- **Ukrainian export geography of poultry meat**

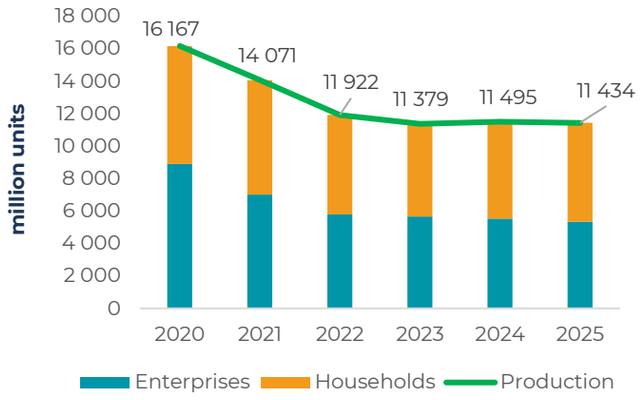
In 2025, most Ukrainian poultry meat exports are directed to the EU-27 (30.6%) and the Middle East (27.2%), reflecting strong demand in these regions. Exports to other European countries outside the EU account for 22.6%, while the rest of the world accounts for 12.5%, including 7.1% to the CIS. This shows that exports are focused on key stable markets.

Ukrainian poultry supply and use, thousand tons

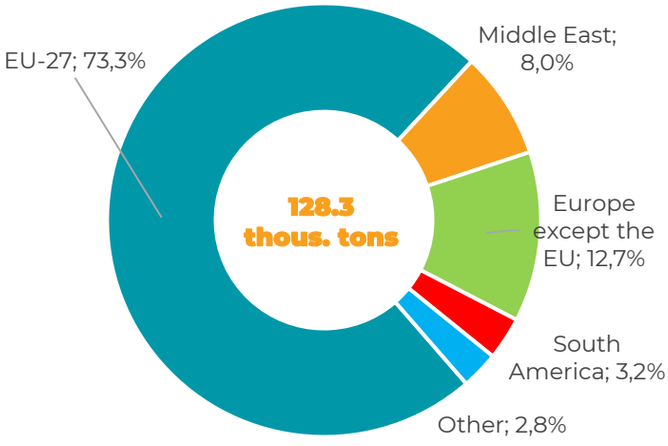
	2020	2021	2022	2023	2024	2025
Production	1 405	1 374	1 253	1 318	1 411	1 390
Stock change	-9	7	3	2	-3	3
Import	113	125	78	60	50	49
Export	435	462	420	423	465	438
Other uses	3	3	5	6	5	6
Fund of consumption	1 089	1 027	903	947	993	968

Eggs

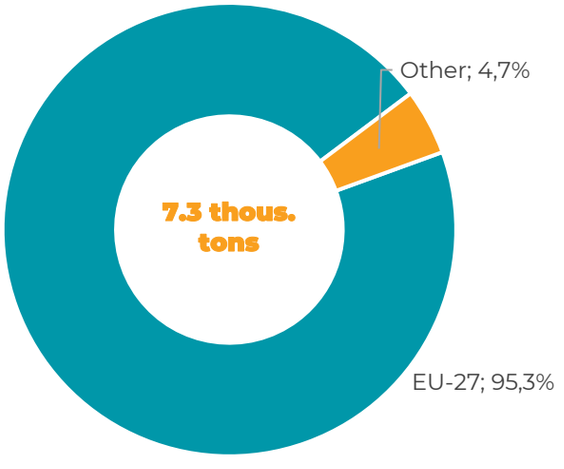
Production structure



Export Eggs in 2025



Export of Egg products in 2025



• Eggs production

In 2025, egg production in Ukraine is forecasted at 11 434 mln eggs, 16% lower than in 2024 and 25% below the 5-year average (2020–2024). Enterprises, which have traditionally been the main producers of eggs, continue to hold the largest share of production, with their output remaining relatively stable compared to the previous year. In 2024, enterprises produced 5 924 mln eggs, and in 2025, a slight increase to 6 085 mln eggs is expected, accounting for 54% of total production.

Households, which also play a significant role in egg production, continue to decline. Their output decreased from 5 531 mln eggs in 2024 to 5 349 mln eggs in 2025, representing 46% of total production. The decline in household production is mainly due to high feed costs, limited financial resources, and general economic difficulties faced by small producers.

Overall, the Ukrainian egg sector demonstrates resilience despite current challenges: large enterprises are stabilizing production, while households are gradually reducing output.

• Ukrainian export volumes of eggs and egg products

In 2025, egg production in Ukraine remains high due to the stable performance of large enterprises, which continue to adapt to best production practices. Companies are implementing modern management systems, production automation, and product certification, allowing them to maintain production volumes even under challenging economic conditions.

The export of chicken eggs shows significant growth: in 2025, export volumes increased by 65% compared to the same period in 2024, reaching 128.3 thous. tons, mainly due to strong demand in European markets and logistical proximity. The export geography shows a clear focus on stable markets: 73.3 % of products are shipped to the EU-27, 12.7 % to other European countries outside the EU, 8.0 % to the Middle East, while the remaining shipments go to Southeast Asia (3.2 %) and other regions (2.8 %).

Regarding exported egg products, 7.3 thous. tons were shipped in 2025, which is 3% less than in the same period of 2024, with 95.3% of the products going to the EU-27.

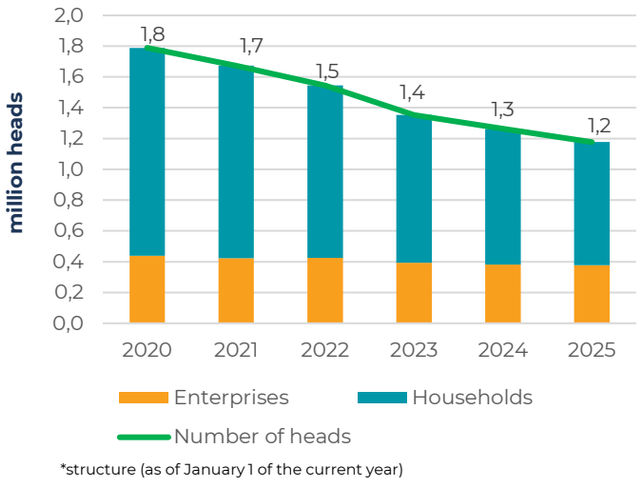
Ukrainian producers continue to invest in product quality and compliance with international standards, supporting stability in foreign markets and ensuring a reliable supply for both export and domestic consumption.

Ukrainian eggs supply and use, million pieces

	2020	2021	2022	2023	2024	2025
Production	16 167	14 071	11922	11 379	11 495	11 434
Stock change	-17	-52	17	-21	12	-7
Import	69	69	107	174	195	200
Export	3 325	1 680	1 474	1 783	1 801	2 800
Other uses	1 333	1 264	1 075	1 030	994	961
Fund of consumption	11 596	11 249	9 464	8 761	8 803	7 654

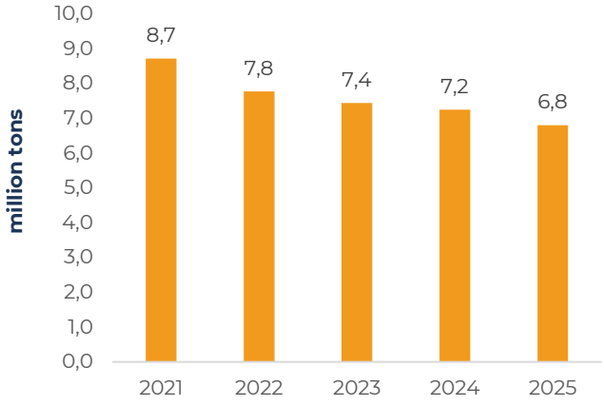
Milk

Number of cows

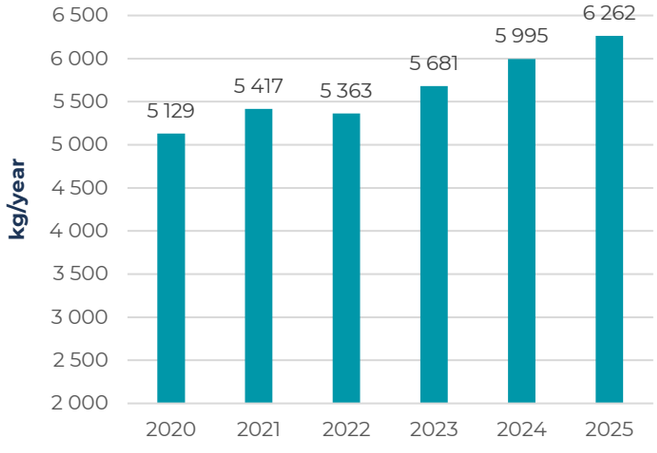


*structure (as of January 1 of the current year)

Milk production



Milk yield per cow



- **Cows stock and production**

In 2025, the number of cows in Ukraine was 1.2 mln heads (-8% compared to 2024 and -22% below the 5-year average). The share of cows in enterprises remains 33% (0.4 mln heads), while 67% (0.8 mln heads) are kept in households. The largest decline continues to occur in households due to the low profitability of milk production, high animal husbandry costs, and the consequences of the war.

Industrial dairy enterprises continue to implement modern management models, acquire new high-yielding cow breeds, and invest in farm automation and modernization. Milk production in 2025 totalled 6.8 mln tons, which is -4% below 2024 and -15% lower than the 5-year average. The decline in raw milk production is driven by the continued reduction in household cow numbers and by limited access to electricity due to shelling, which increases the cost of processing milk into dairy products.

Overall, Ukraine's dairy sector shows a growing concentration of production in the industrial sector, while households are gradually exiting milk production. This trend underscores the need for further modernization and state support to stabilize and develop the industry.

In 2024, average milk yields per cow increased by +5% to 5,995 kg per year. Average milk yields are increase to 6,262 kg per year in 2025.

- **Ukrainian export volumes of milk products**

Ukrainian export volumes of milk products have grown steadily in recent years, driven by rising demand in international markets. Domestic producers continue to improve product quality and adapt to European standards, which opens access to more competitive markets.

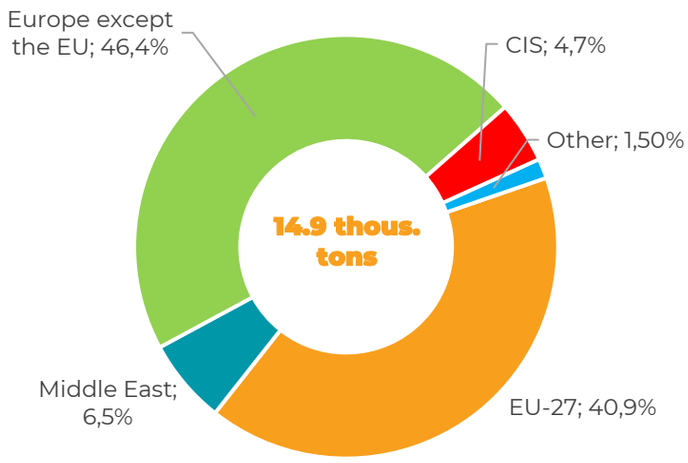
The EU remains one of the key destinations for Ukrainian dairy exports, particularly for butter, cheese, and milk powder. At the same time, exporters are actively diversifying supplies to countries in the Middle East, Asia, and Africa. Despite logistical challenges and fluctuating global prices, the industry maintains positive export dynamics. Producers are investing in modernization and sustainability to strengthen their positions abroad.

Ukrainian milk supply and use, thousand tons

	2020	2021	2022	2023	2024	2025
Production	9 267,4	8 713,9	7 767,7	7 430,4	7 246	6 862
Stock change	34	-6	5	-4	3	-2
Import	745	841	402	431	469	470
Export	409	395	519	372	393	550
Other uses	652	610	528	493	485	435
Fund of consumption	8 917	8 556	7 118	7 001	6 835	6 431

Milk

Export geography of Butter in 2025

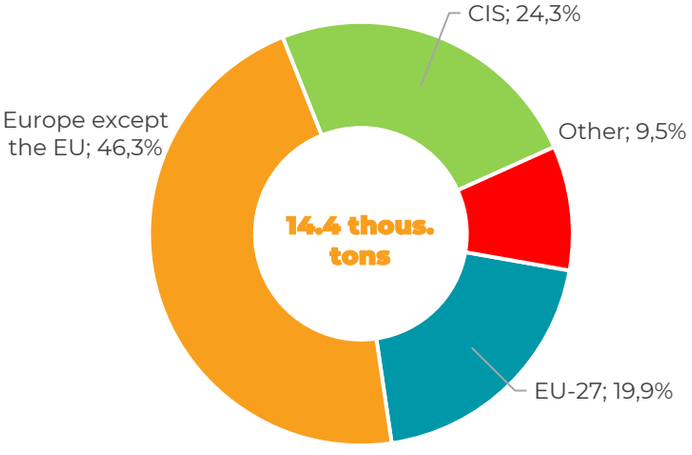


- **Butter export**

In 2025, 40.9% of Ukrainian butter is exported to the EU-27 countries, reflecting strong trade relations with the European market. 46.4% of shipments go to other European countries outside the EU, 6.5% to the Middle East, 4.7% to CIS countries, and the remaining 1.5% to other regions.

The total butter exports in 2025 amounted to 14.9 thous. tons, which is 2 times higher than in the same period of 2024. This growth indicates stable demand for Ukrainian butter on international markets and producers' effective efforts to improve product quality. Additionally, exports show a gradual diversification of destination markets, reducing dependence on individual regions.

Export geography of Cheese in 2025

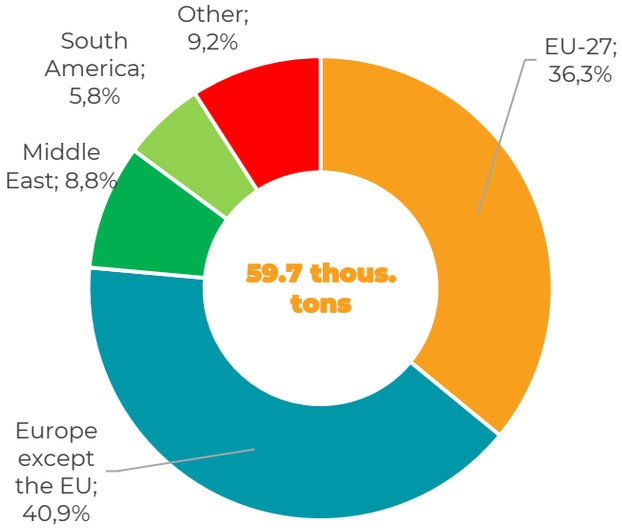


- **Cheese export**

In 2025, the export geography of Ukrainian cheese is highly diversified. 19.9 % of the products are shipped to EU-27 countries, 46.3 % to other European countries outside the EU, 24.3 % to CIS countries, and the remaining 9.5 % to other regions.

Exports in 2025 totaled 14.4 thous. tons, which is 16 % higher than in the same period of 2024. This growth reflects stable demand for Ukrainian cheese on international markets and producers' effective efforts to enhance product quality. In addition, exporters are actively diversifying their sales markets, reducing dependence on individual regions. A significant portion of exports consists of semi-hard and hard cheeses, which enjoy the highest demand in foreign markets. Ukrainian cheese has significant potential for expansion into the EU and Asian markets, driven by improvements in product quality and compliance with international standards. Investments in production modernization, automation, and the adoption of European technologies enable Ukrainian producers to increase their competitiveness in global markets.

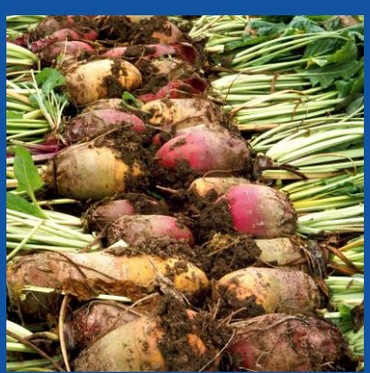
Export geography of milk and cream in 2025



- **Export of milk and cream**

In 2025, the export geography of milk and cream (HS 0401, 0402) from Ukraine shows a strong presence in key markets: 36.3 % of the products are shipped to EU-27 countries, 40.9 % to other European countries outside the EU, 8.8 % to the Middle East, 5,8 % to South America, and the remaining 9.2 % to other regions.

Exports in 2025 totalled 59.7 thous. tons, 6 % less than in the same period of 2024. Despite the slight decline, Ukrainian producers maintain a stable presence in key foreign markets. The highest demand is observed for fresh milk and high-fat cream, which are valued in European and Asian markets. The growth in shipments to the Middle East and Asia opens new opportunities to expand exports of Ukrainian dairy products. Ukrainian producers offer high-quality products, and demand for them in foreign markets is expected to grow in the coming years.



MINECONOMY

Contacts

Ukrainian Agribusiness Club
info@ucab.ua